Elecāte™

INTELLIGENT **CATERING+EVENT+RENTAL** SOFTWARE

User Manual

v 1.0 :: 5.3.2024

Welcome.

Captivate customers. Accelerate productivity & profits.

Elevate your catering, event, or rental business with the intelligent, all-in-one management software trusted by industry icons—created by industry experts

To thrive, you account for every detail—we know. Elecate employs brilliantly efficient software with over 30 years of results for the complex needs of hospitality and rental businesses. Capture and track deals with our native CRM. Win more events with stunning proposals. Run comprehensive reports confirming your ROI. Accelerate your team's growth with extensive support and training.

From ingredients to inventory, dispatching to staffing, production to profit, Elecate is your guiding star.

This guide is designed to help you utilize every feature to help you save more time and manage business flawlessly. If you have any questions, please reach out to our support team at support@elecate.com or create a ticket here: https://elecate.com/submit-a-ticket

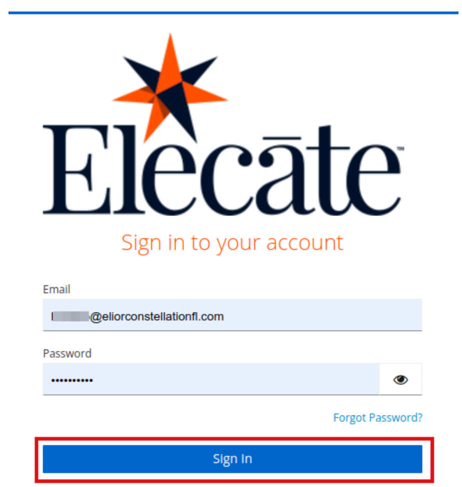
Accessing Elecate

Elecate cares about you, and your customer's safety. With that in mind, we enforce a process of accessing your profile and content, that guarantees only authorized individuals can access sensitive information and perform actions in the system.

Logging in with Email and Password

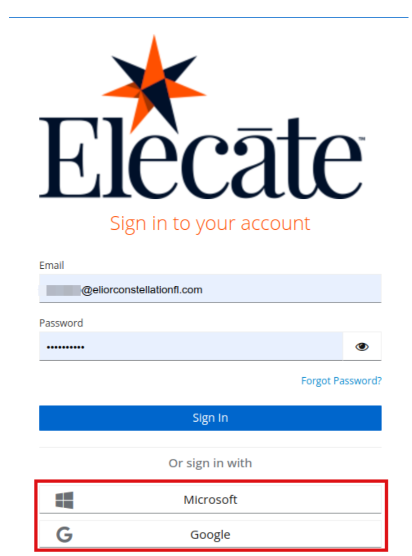
To log in using your email address and the password provided by your system administrator:

1. Enter your credentials click on Sign In



Single Sign On

To simplify the process of accessing the website, you can now sign in using your Google or Microsoft account.



Home Page Quick Tour

a. **Main Panel:** Most features are listed and arranged inside these options.

b. **Calendar:** The built-in calendar is a great way to visualize upcoming events.

c. **App Setting Information:** System settings can be adjusted here, by an administrator.

d. **Help Center:** In the Help Center, users can reference our FAQs.

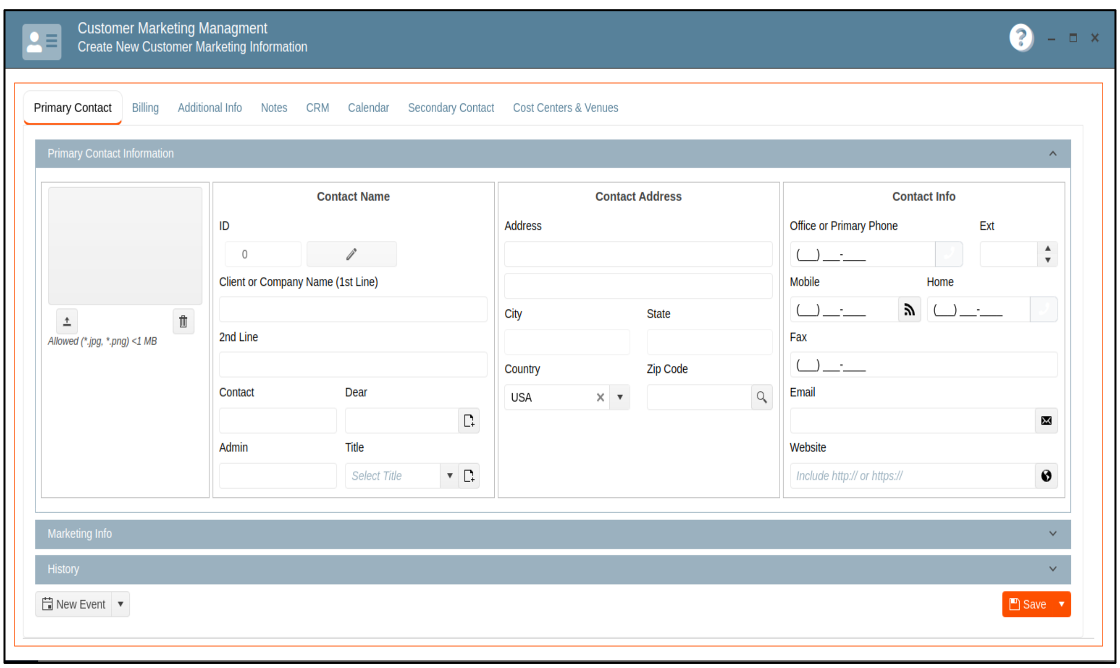
Sales & Marketing

Customer CRM

Creating a New Customer

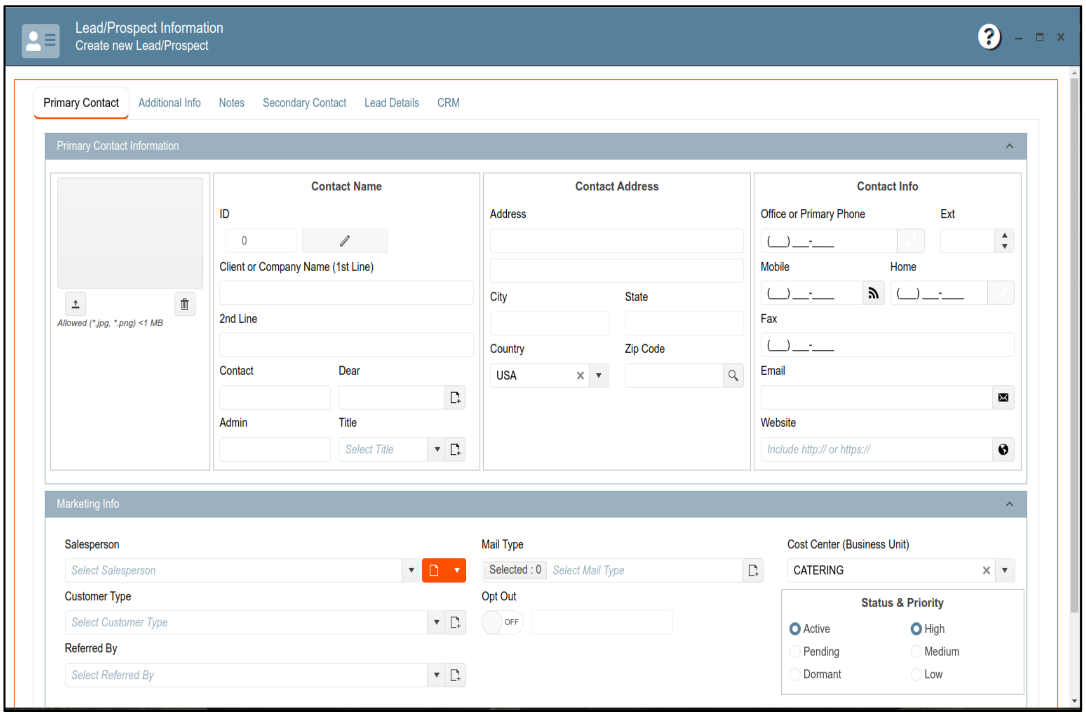
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on the *Customer (CRM)*
3. Click on *Customer Marketing*
4. Select *Create New Customer*
5. On the *Create New Customer Marketing* information screen, enter the following information:
   a) Client or Company Name*****, Contact*****, Title (Event Management, Director Sales, etc.)
   b) Contact Address, City, State, Country, and Zip Code*****
   c) Contact Info Office or Primary Phone, Mobile, Home, Email*****
   d) Referred by*
5. Once you enter all the information click on “Save”.

***** All these fields are required to save changes successfully.



Edit Customer Information

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Customer CRM,* and then *Customers Marketing*. The *Customer Marketing Window* will appear
3. From the menu, click on *Customer Marketing Management*
4. Access to any client's information by clicking on the pencil icon or by double-clicking on the event row
5. Click on the pencil tool
6. From in the pop-up window, you can edit the customer's information
7. Once you have made all the changes, click on *Save*.

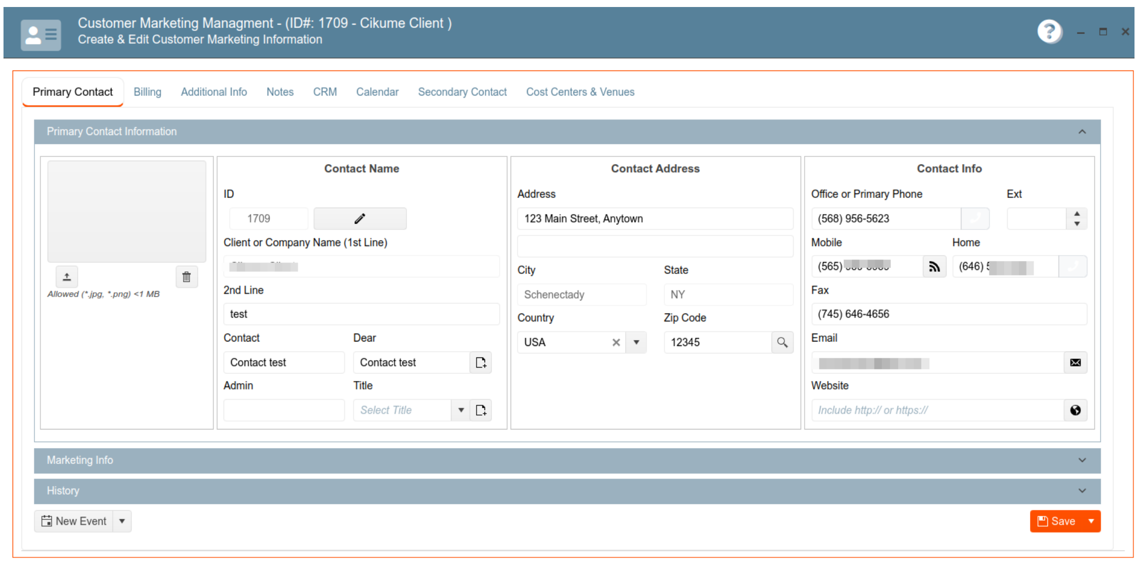


Create a New Prospect

Leads and Prospects are potential customers who have expressed interest or demonstrated potential in purchasing catering and event services but have not yet made a commitment. To create a new lead or prospects, follow these steps:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Customer* CRM and then click on *Lead/Prospect*. The *Customer Lead/Prospect* window will appear
3. From the menu, click on *Lead/Create New Prospect*
4. Enter the following information:
    - Client or company name*****
    - Address, City, State, Zip Code, Country*****
    - Phone number*****
    - Email*****
4. Click on *Save*

***** All these fields are required to save changes successfully.

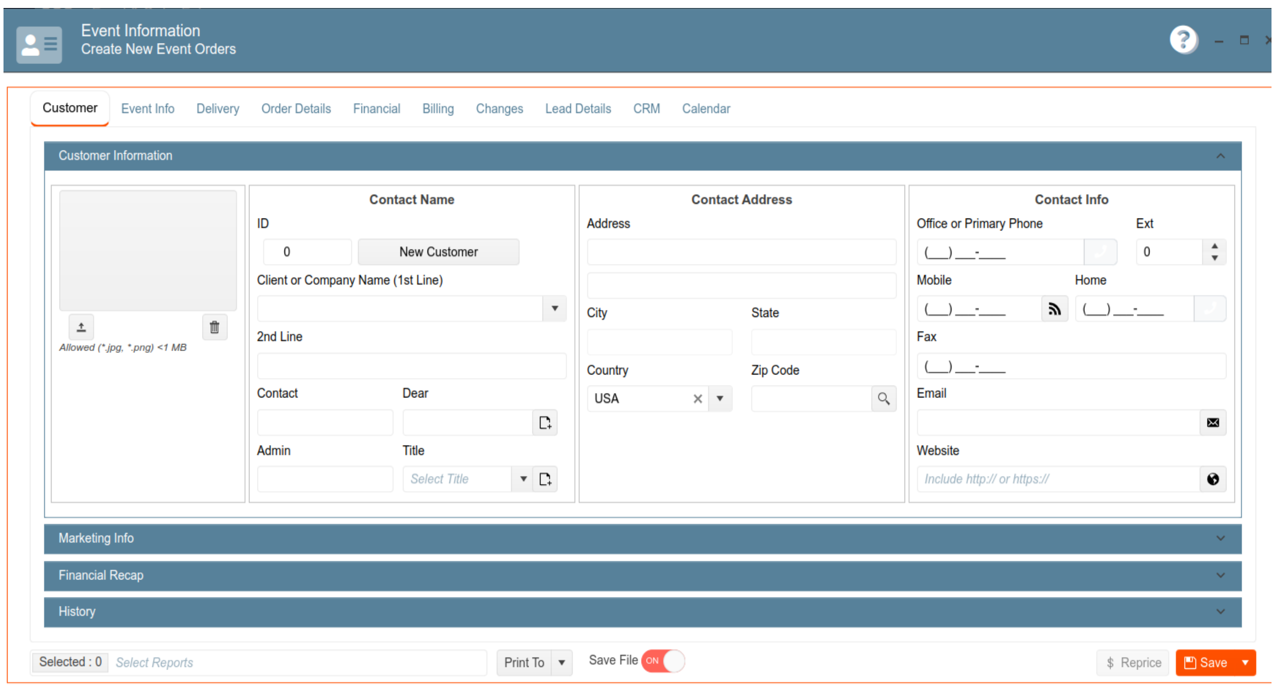


Event & Order Management

The event information screen houses the key details of each event, including the event date, time, location, guest count, order details, special requests, and any other necessary details for planning and executing the event.

Creating a New Event

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Click on *Create New Events Orders*
    - Users can then select an existing customer, or enter a new customer
4. Complete all the required information
5. Once you have entered the required information click on Save

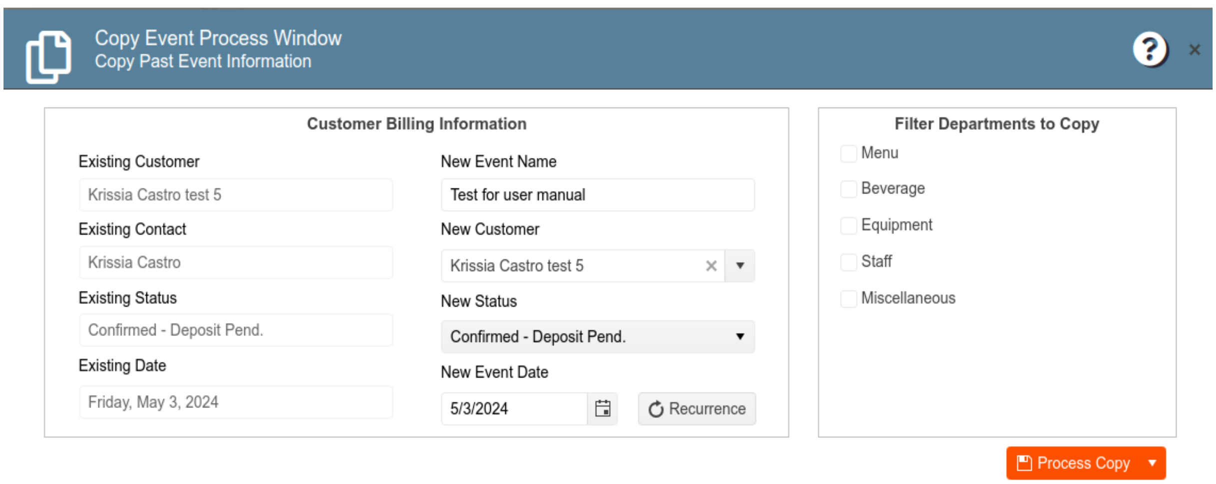


TIP: You can also create an event directly from the customer's file, click on the *New Event* button and the *Event Information* window will appear.

Copy an Event

You can also create an event from an existing one.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Select the event by checking the box next to the pencil icon
5. Click on the down arrow next to the *New Entry* button
6. From the drop down menu, select copy event
7. The *Copy Event Process Window* will pop up
8. Update the billing information
9. Click on *Process Copy.*

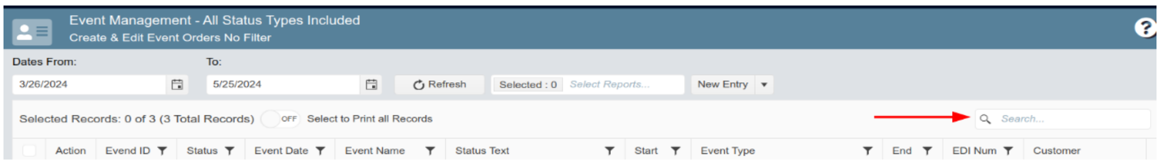


Searching for Events

To quickly find an event, you can choose any of the following options:

A.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. On the search bar located on the upper right corner you can look for you event by name, date or event ID.



B. You can also look at the *Event Calendar* by double clicking on the calendar located on the top of the screen next to Elecate's logo.

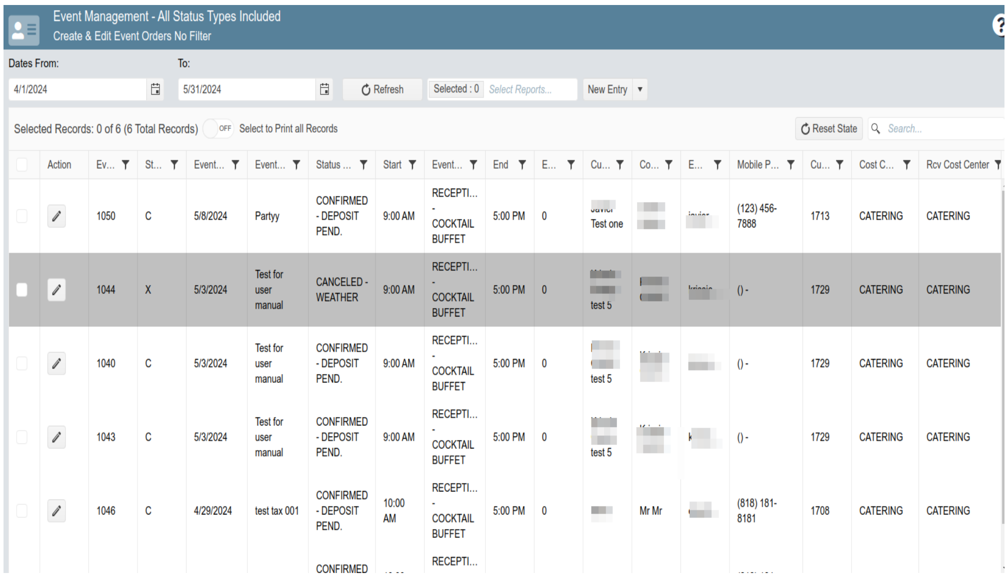
C.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Select *Search for Event by EDI Number* and enter the EDI number on the pop up screen.

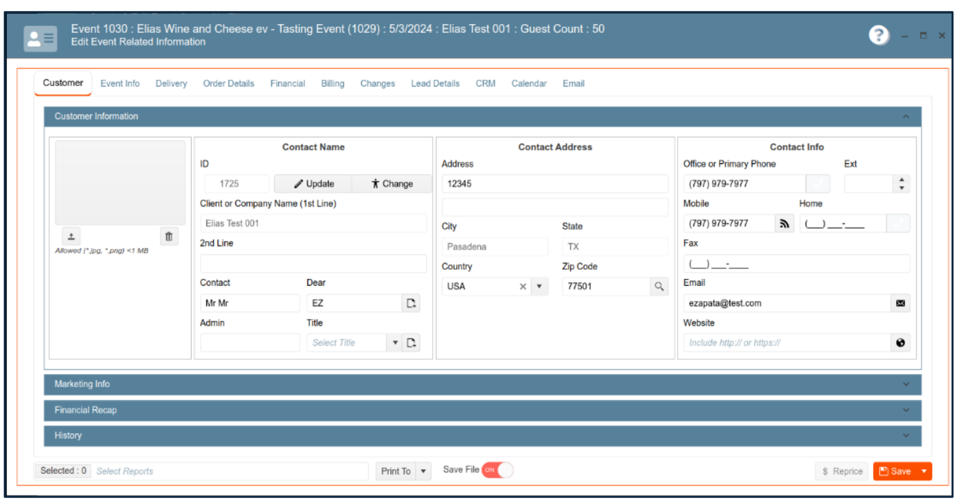
Editing an Existing Event

Once you have one or more events entered, you can make changes as needed:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Select *Event Management All Status Types Included.* This section should look like the picture below.



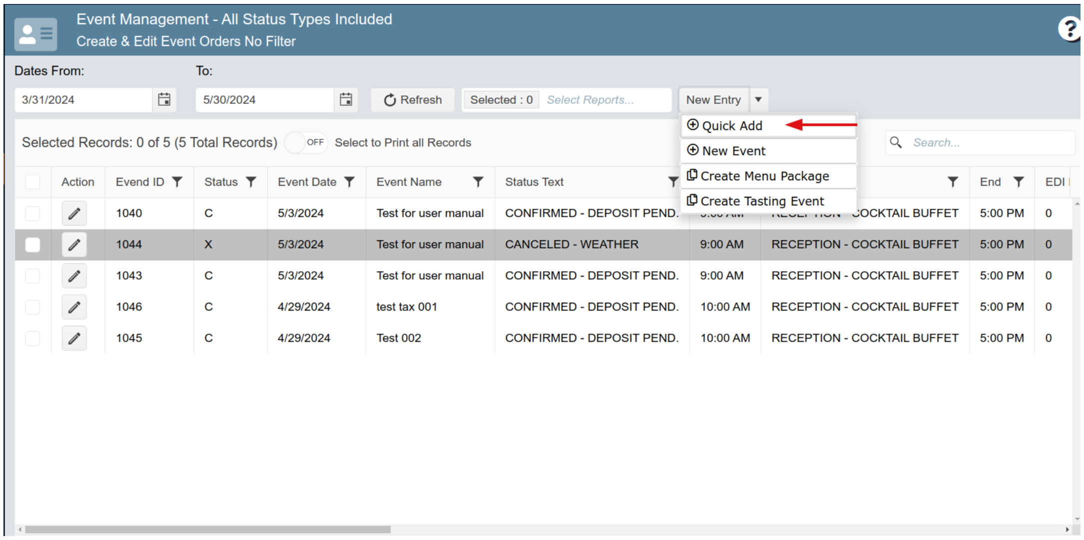
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Make the changes and click on *Save*



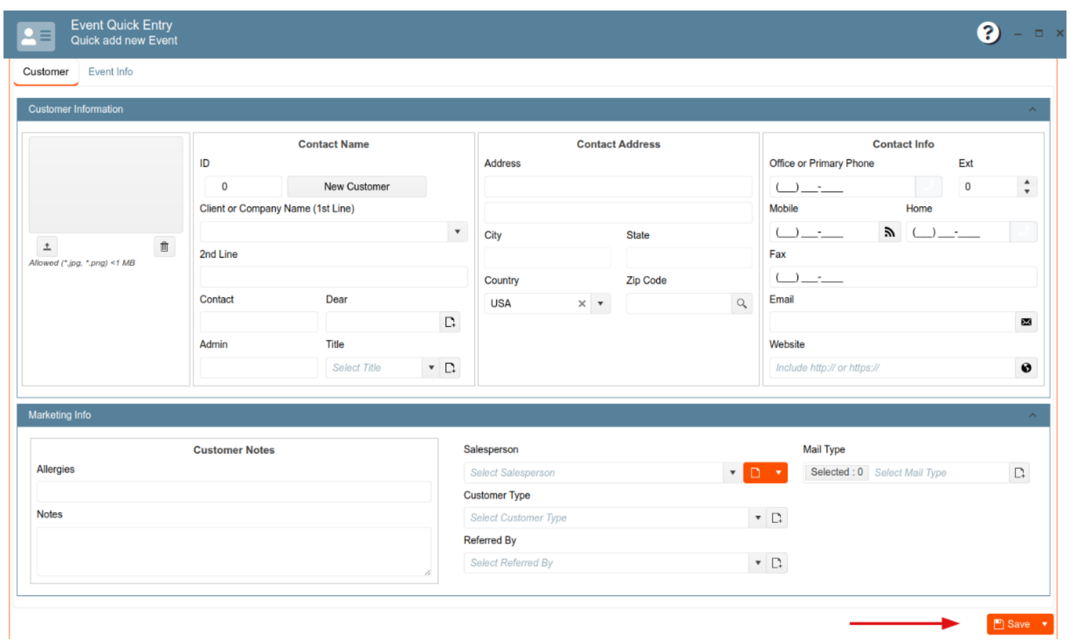
Adding a Quick Event

To quickly capture the basic details of a new event, users can use the Quick Event feature.

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management.*
3. Click on *Event Management-All Status Types Included*
4. Click on the down arrow next to the *New Entry* button
5. From the drop-down menu, select *Quick Add*



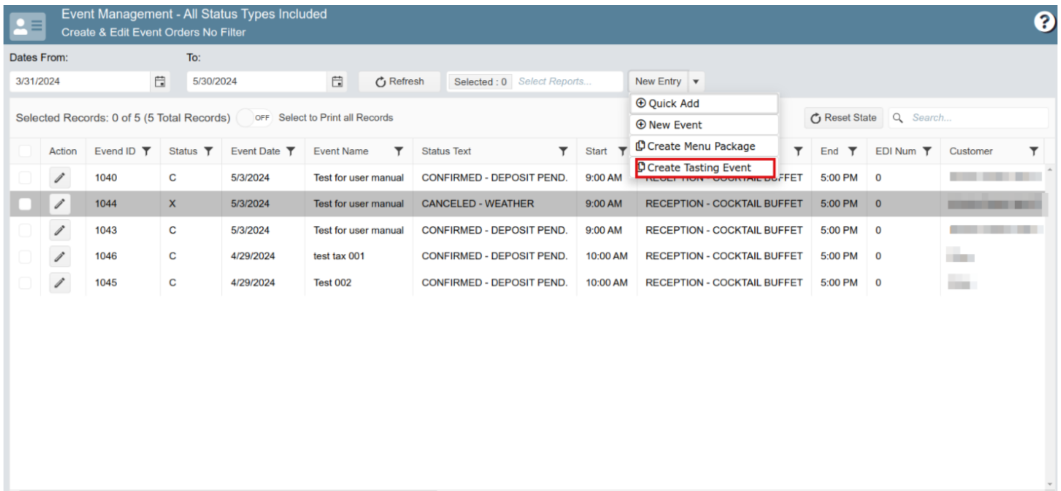
6. A pop-up window will appear
7. Once you have entered all the information, click on *Save*



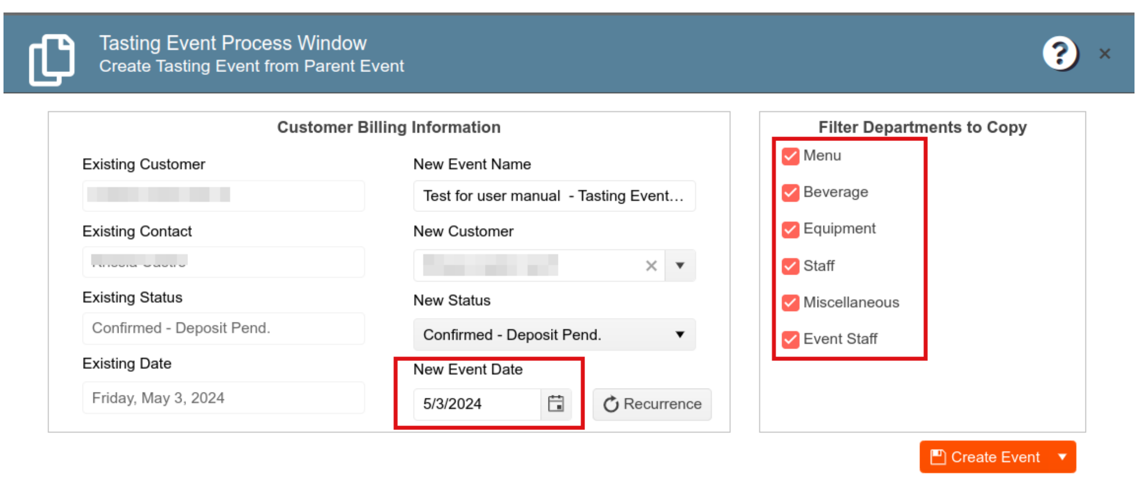
Creating a Tasting Event from an Already Existing Event

To create a tasting event from the parent event, copying over the relevant details, follow the instructions below:

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management*
3. Click on *Event Management-All Status Types Included*
4. Click on the down arrow next to the *New Entry* button
5. From the drop-down menu, select *Create Tasting Event*



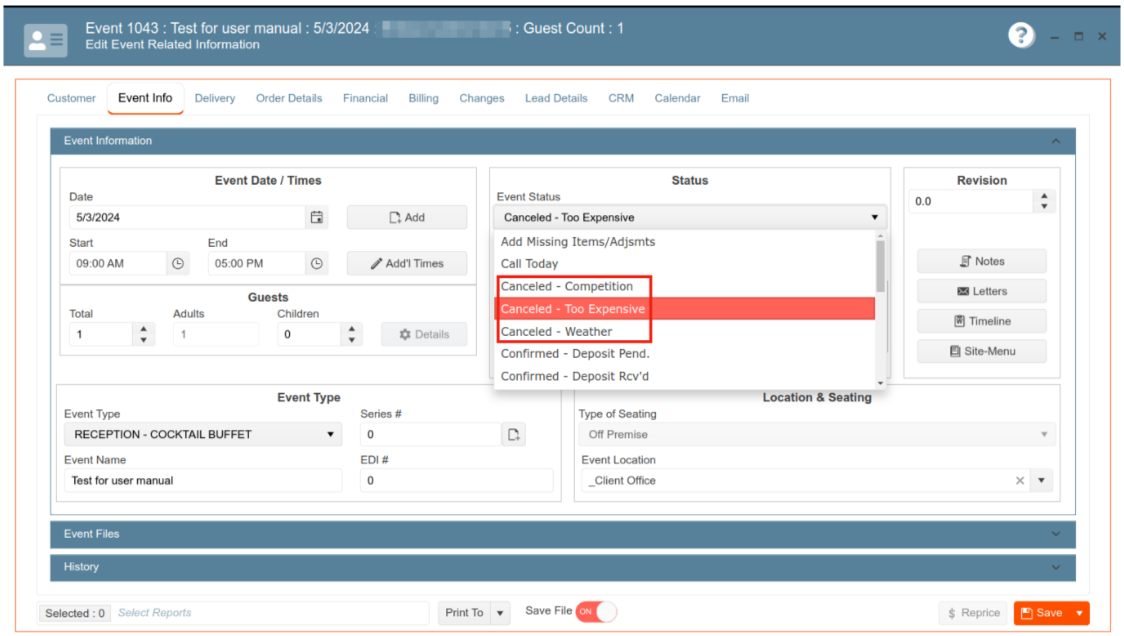
6. Pop-Up will appear
7. Make sure to change the date before the main date
8. Select the departments you want to copy from the parent event to the tasting event. Uncheck the box for orders you do not wish to copy over.
9. When you have entered all the information, click on *Create Event*



Canceling an Event

To cancel an event, follow the steps below:

1. Click on the *Sales and Marketing* section located on the left pane
2. Click on *Events & Order Management*
3. Click on *Event Management-All Status Types Included*
4. Select the event you want to cancel by clicking on the pencil button or double clicking on the event row
5. Select the Event Info Tab, Go to the Event Status
6. Click on the drop down and select from the list of cancellation reasons. Next, a pop- up will appear. Please provide additional context for the cancellation.
7. Once you have finished click on *Save.*

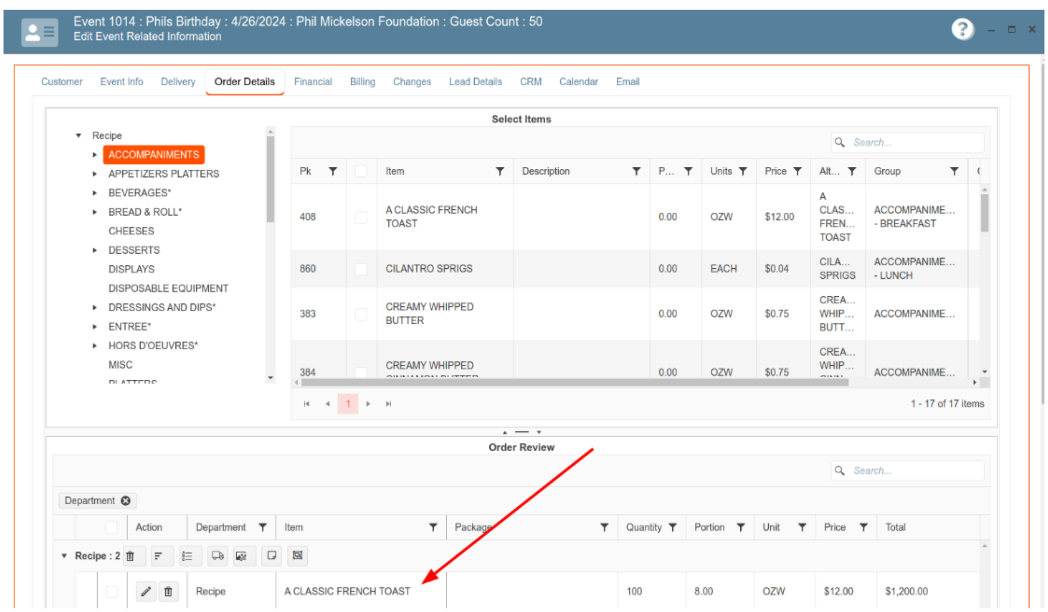


Proposal Creation Process

Adding items from the *Recipe* Department

From the event window you can add items in different categories, which are called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Recipe* department and navigate through the various options. The department details will appear in *Select Items.*
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity, Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review.*

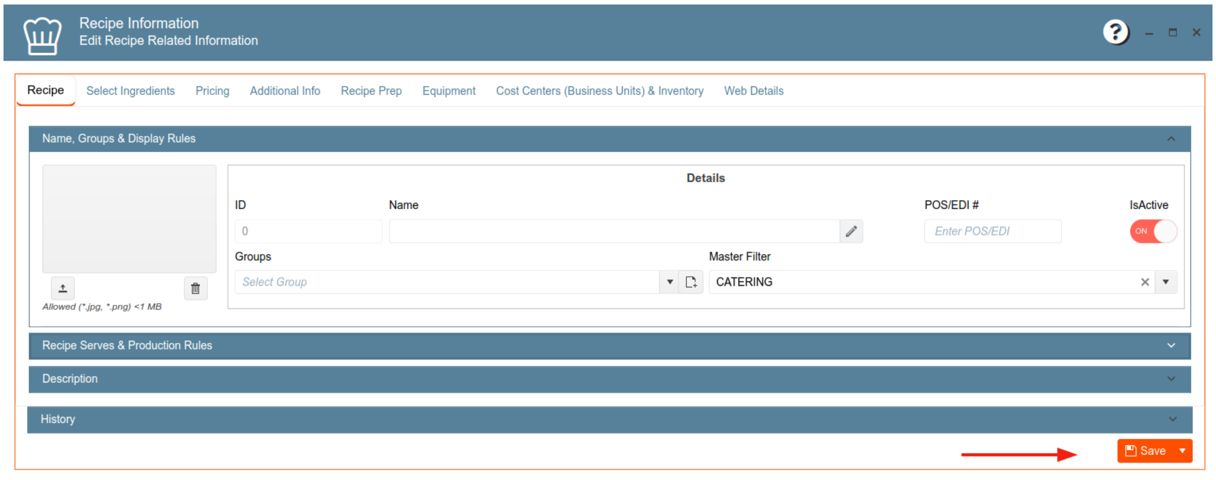


Important: To save items, the event entry must have been completed and saved first.

On the Fly Recipes

To quickly add a recipe that isn't in your database, you can use the on-the-fly recipe tool.

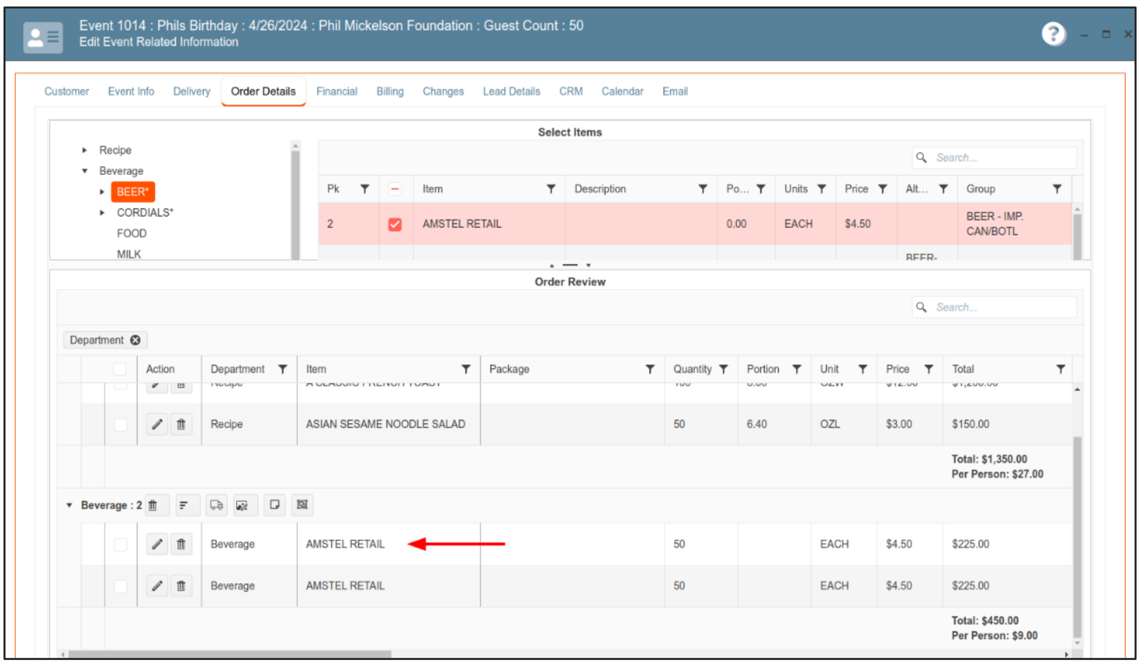
1. Click on Data Items section located on the left panel
2. Select *Food Management* and the *Food Department* window will appear
3. Select Recipe Management (On the fly)
4. Click on the New Entry button, and the Recipe Information window displays
5. Complete the fields and click save



Adding Items from the *Beverage* Department

From the event window you can add items in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Beverage* department and navigate through the various options. The department details will appear in *Select Items.*
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity, Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review*



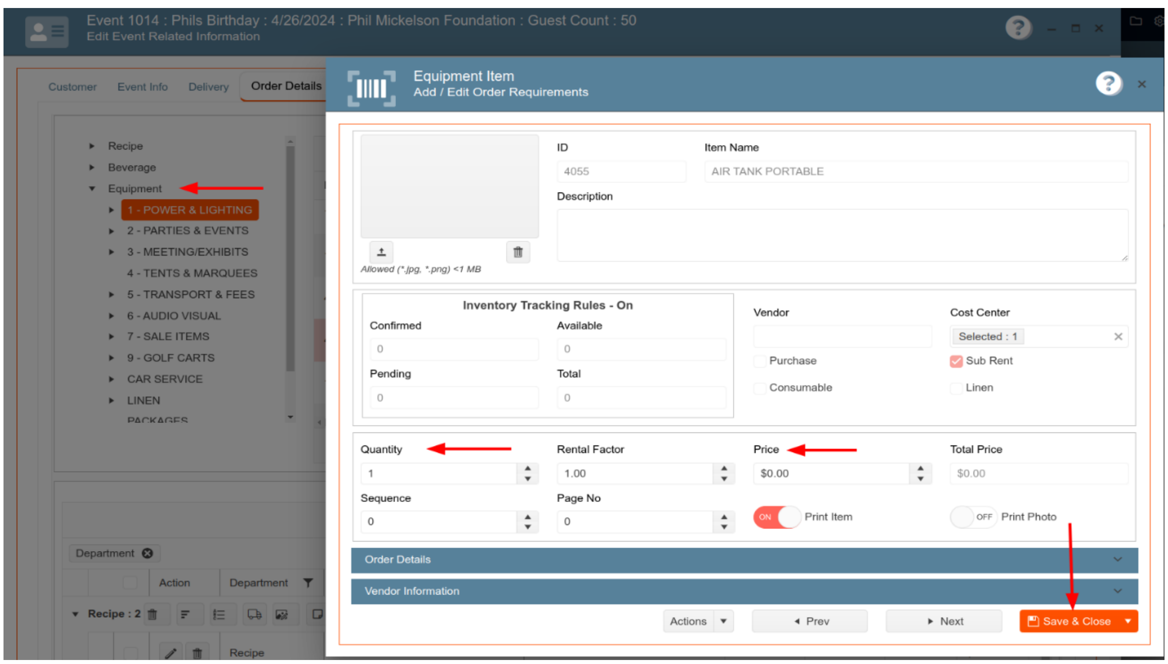
Important: To save items, the event entry must have been completed and saved first.

Adding Items from the *Equipment* Department

From the event window you can add items in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*, the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Equipment* department and navigate through the various options. The department details will appear in *Select Items.*
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity, Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review*

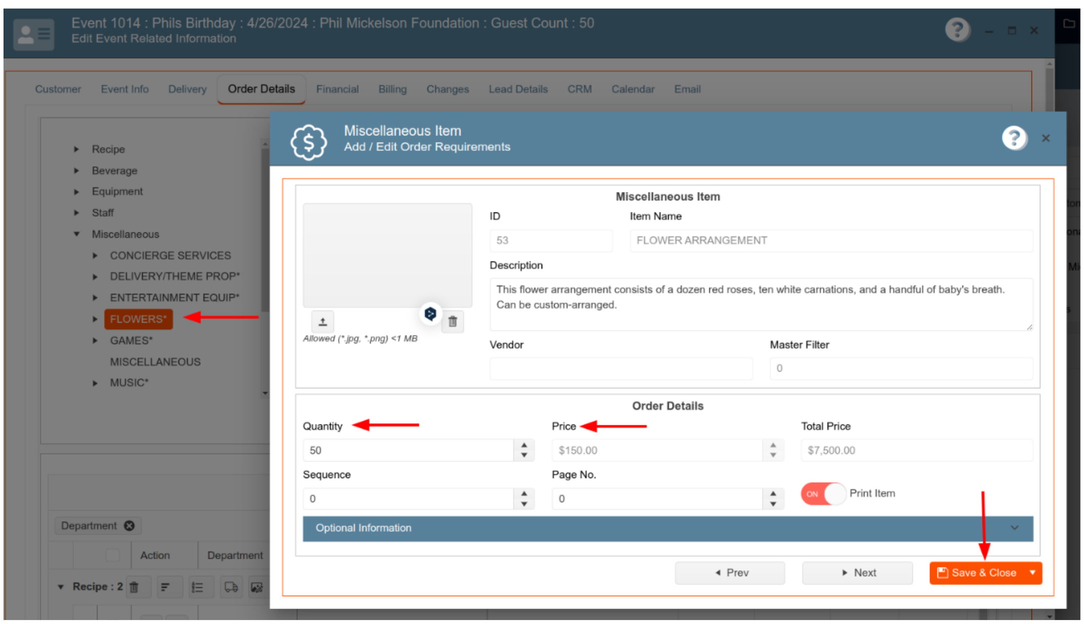
Important: To save items, the event entry must have been completed and saved first.



Adding Items to the *Miscellaneous* Department

From the event window you can add items such as outside rentals, florals and third-party services in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

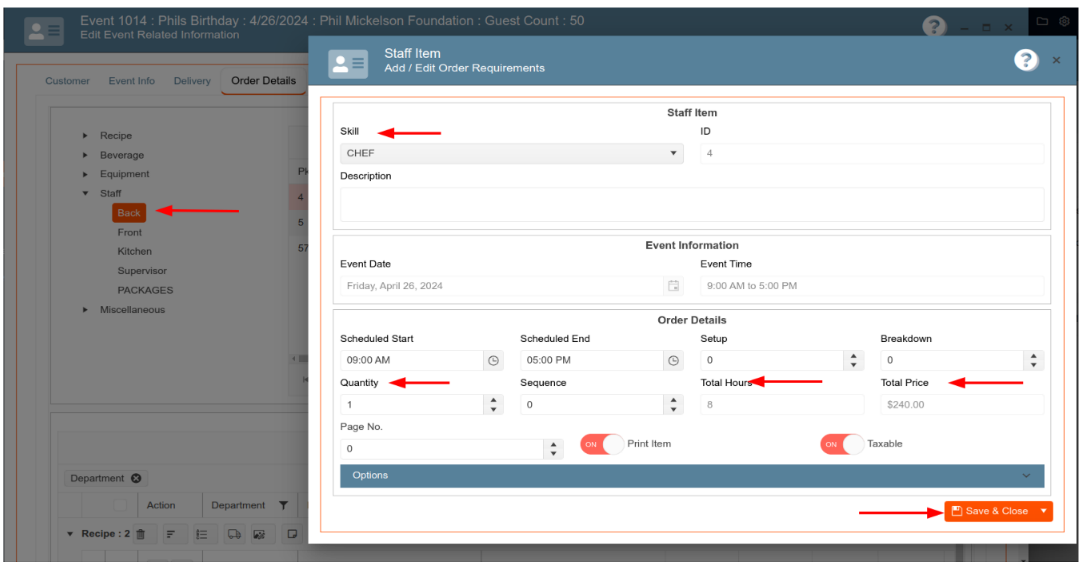
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Miscellaneous* department and navigate through the various options. The department details will appear in *Select Items.*
7. Add the desired item by double-clicking on it, an *Add/Edit* window will pop up
8. Review *Quantity, Description*, and other details
9. Click on save and close
10. The new items will appear under *Order Review*



Requesting Staff in the *Staff* Department

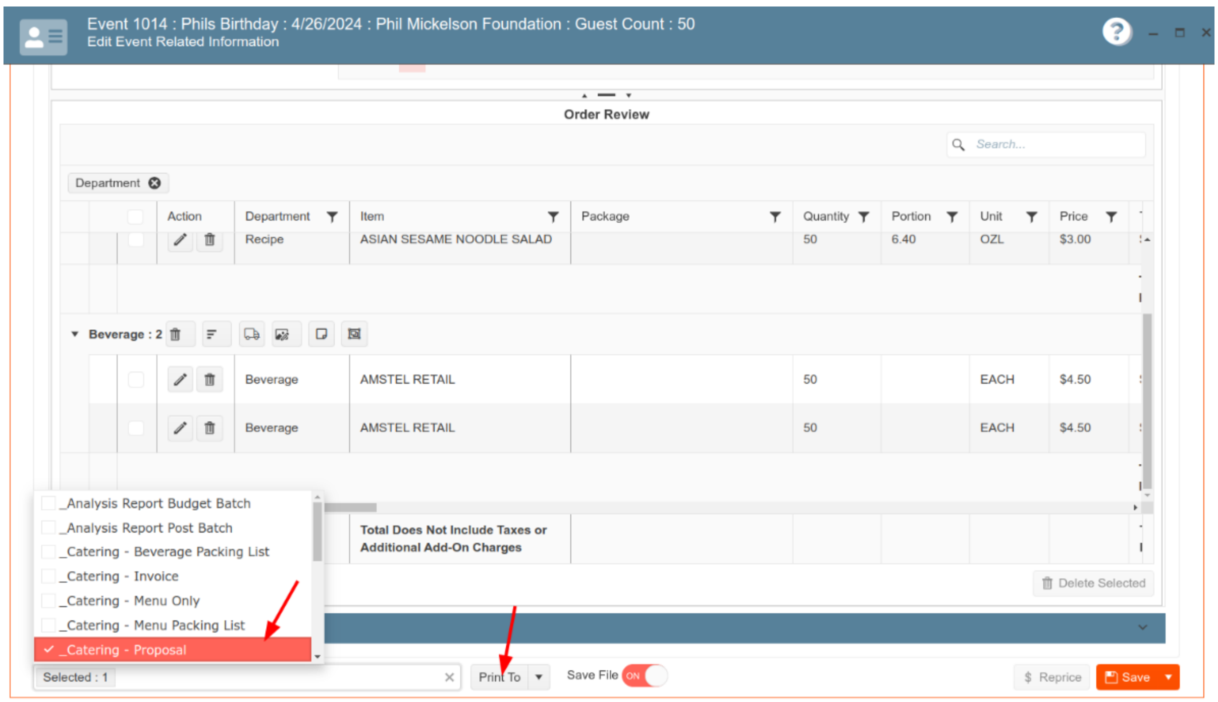
From the event window you can add items in different categories, called *Departments* in Elecate, and are located at the left of the *Order Details* tab.

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the *Order Details* tab
6. Select the *Staff* department and navigate through the various options. The department details will appear in *Select Items.*
7. Add the desired role by double-clicking on it, an *Add/Edit* window will pop up
8. Fill out the details such as price , skill, and quantity
9. Click on *Save* and close
10. The new roles will appear under *Order Review*



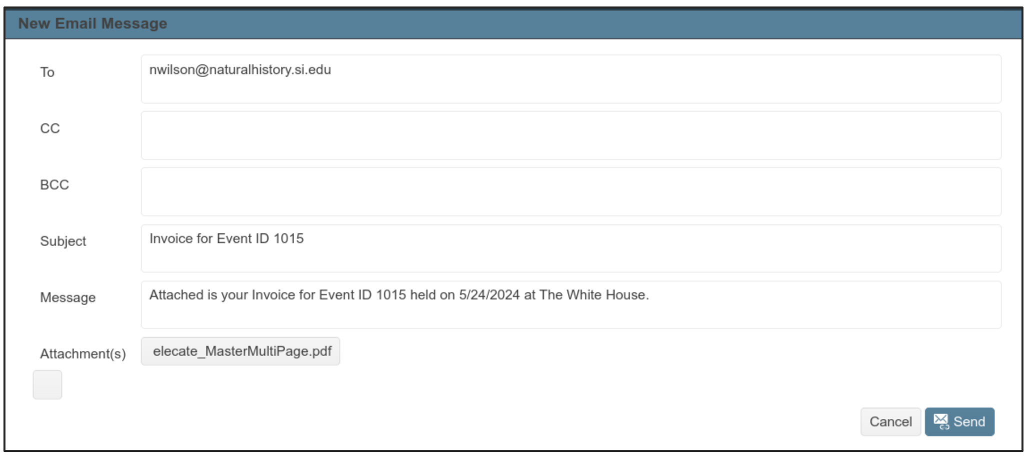
Printing Proposals

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the bottom of the window and look for the box that says *Select Reports*
6. Click into the box and select *Catering Proposal. This will work from any of the tabs*
7. Click on the down arrow next to the *Print to* button and select the preferred format
8. Elecate will generate the report.



How to Email a Proposal

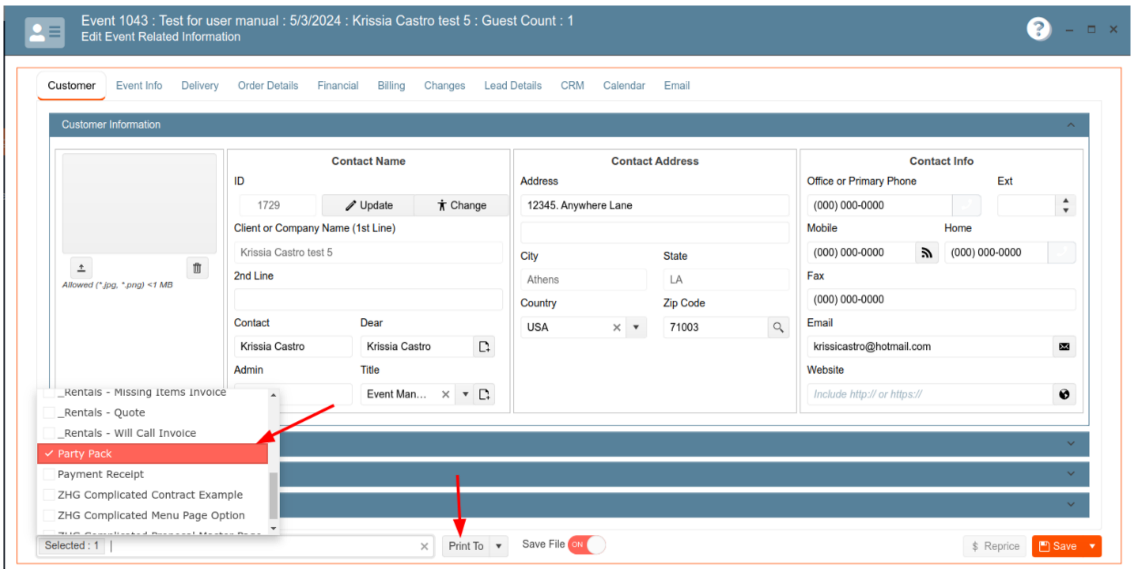
1. Users can send proposals to clients within the Elecate application by following the steps below: Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the bottom of the window and look for the box that says *Select Reports*
6. Click into the box and select *Catering Proposal. This will work from any tab.*
7. Click on the down arrow next to the *Print to* button and select *Send Email,* a *New Email Message* screen will pop up
8. Customize your message and click on *Send.*



Generate a Party Pack (BEO)

There are several types of reports that can be generated in Elecate. Below are the steps to generate a Party Pack (BEO)

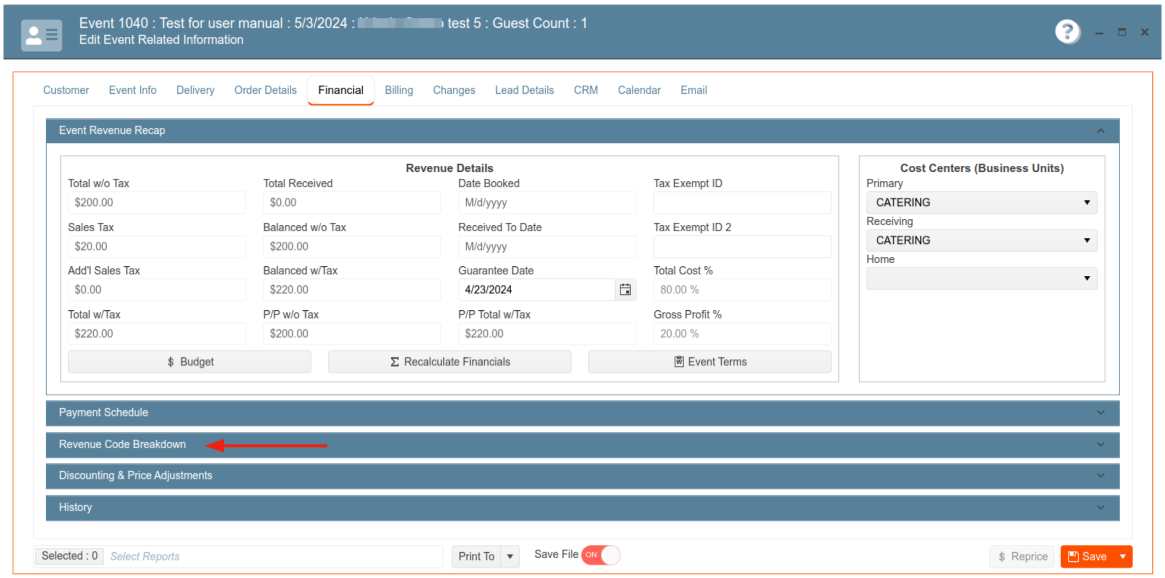
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Select *Event Management All Status Types Included*
4. Open the event by clicking on the pencil icon or by double-clicking on the event row
5. Go to the bottom of the window and look for the box that says *Select Reports*
6. Look for and check the box *Party Pack*
7. Click on the down arrow next to the *Print to* button and select the desired report
8. Elecate will generate the report.



Entering Discounts

Below are the steps to discounting an event:

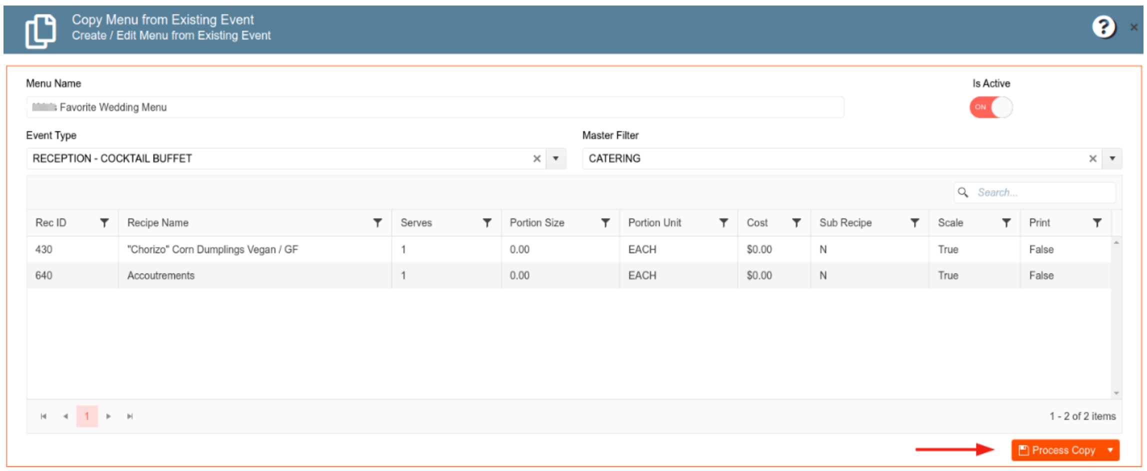
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management,* the *Event Management* window will show
3. Click on *Event Management-All Status Types Included*
4. Select the Event to which you want to apply the discount
5. Go to the *Financial* Tab
6. Go to the *Discount & Price Adjustments* section
7. In the *Disc Amt* column, enter the amount in dollars, the system will automatically show the percentage on the next column, called *Disc Pct.* Discounts can also be applied as a percentage, and the follar amount will automatically calculate.
8. Once you applied the discount click on *Save Price Adjustments*
9. When you finish click on the *Save* button.



Creating a Menu Package

Sales users and administrators can create a grouping of recipes to be used repeatedly by following the steps below:

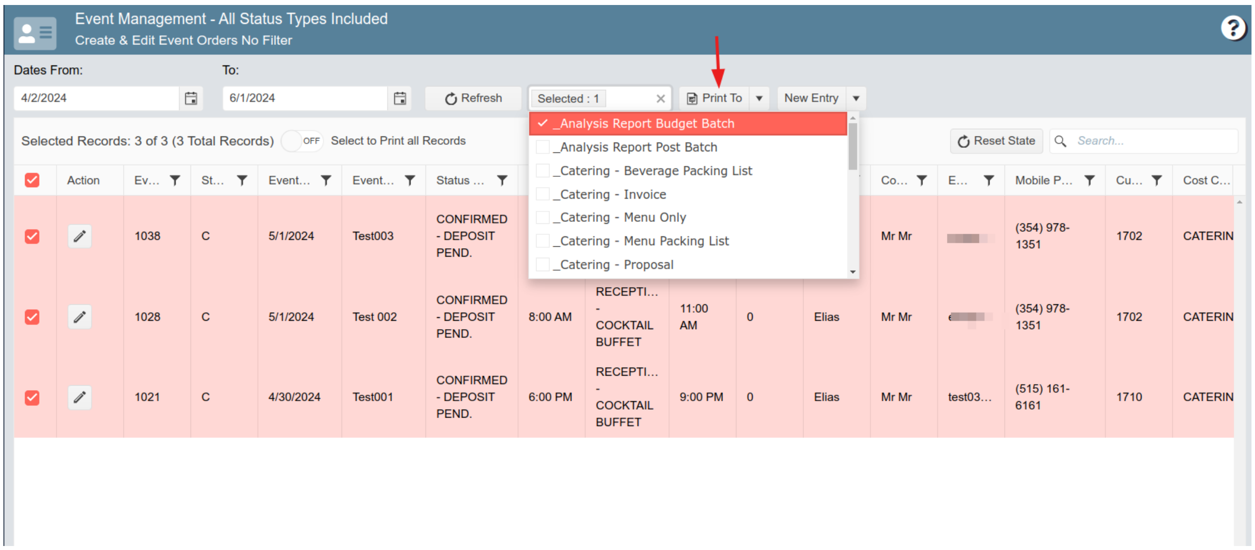
1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*
3. Click on *Event Management-All Status Types Included*
4. Click on the down arrow next to the *New Entry* button
5. In the dropdown click on *Create Menu Package* option
6. A pop-up will appear.
7. Check the items and if everything is ok click on *Process Copy*



Running Batch Reports

Below are the steps to generate reports for more than one event at the same time:

1. Click on the *Sales and Marketing* section located on the left panel
2. Click on *Events & Order Management*
3. Click on *Event Management-All Status Types Included*
4. Select all the events
5. Select a Report
6. In the under arrow next to *Print to* button select a format or preview
7. Click on *Print to*



Finance & Accounting

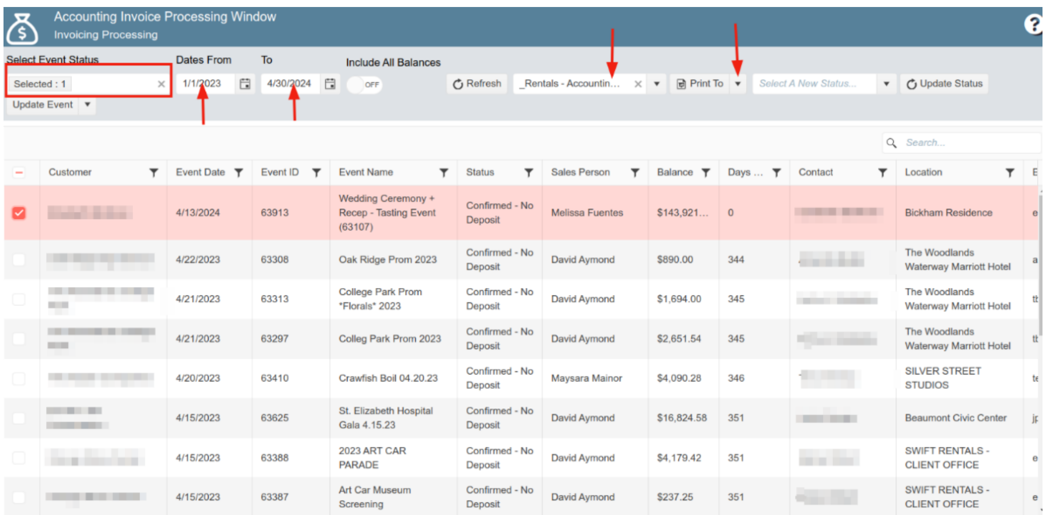
Elecate

Accounting Tools

Generating an Invoice

In this section you can create a formal document outlining the cost details for an event

1. Click on Finance & *Accounting* located in the side panel
2. Select *Accounting Tools*
3. Click on *Accounting Invoice Processing Window*
4. Select the *Event Status* for the events that you would like to view (e.g. Confirmed)
5. Set the date range and click *Refresh*
6. Select the report you want to generate. (e.g. Accounting Invoice)
7. Select the event Click on the down arrow next to the *Print to* button select the preferred format.



Entering Customer Tax Exempt Information and Certificate

1. Go to *Finance and Accounting*
2. Select *Customer Financials* twice
3. From the menu, select *Customer Financial Management*
4. Choose the customer you would like to edit by selecting the pencil icon or by double clicking on it
5. Go to *Certificates* tab
6. Click on *Add*
7. Write the Certificate Number
8. Choose a *State*
9. Enter the *Effective date* when the certificate is valid
10. Upload an attachment by Choosing a file
11. At the dropdown choose the *File Type*
12. In the dropdown called *Preview*, save your work.

Production

Production Reporting

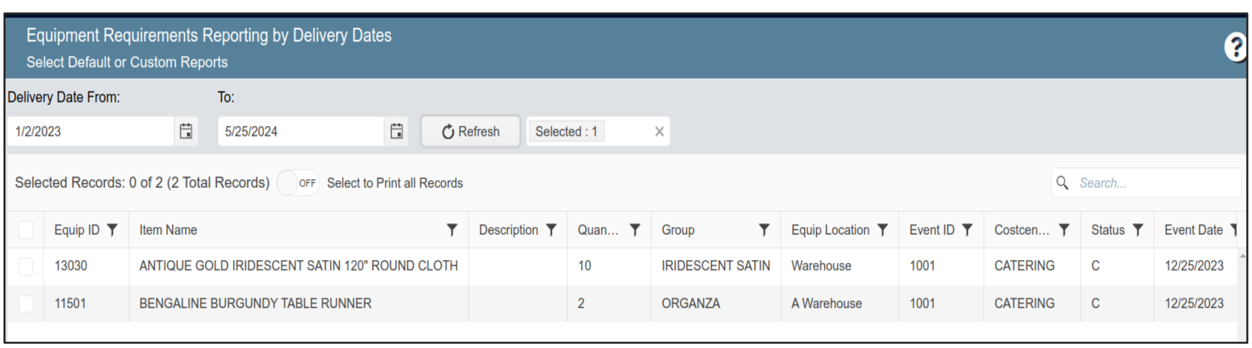
Below you will find instructions for running and printing production reports.

Production Reports

1. Select the *Production* section located on the left pannel
2. Select *Production Reporting*
3. Click on *Production Reports* and the *Production Reporting* window appears
4. Look for *the* desired report and click on it
5. Choose a date range
6. Select the desired report
7. Click on *Refresh*
8. Select the event from which you need the report
9. In the *Print to* down arrow, you can select the format you prefer or downloading

- The available formats are:
    - Preview
    - PDF
    - Excel
    - CSV
    - Word
    - PowerPoint
    - Send Email

10. Elecate will generate the report using the selected format.



Data Items

Food Management

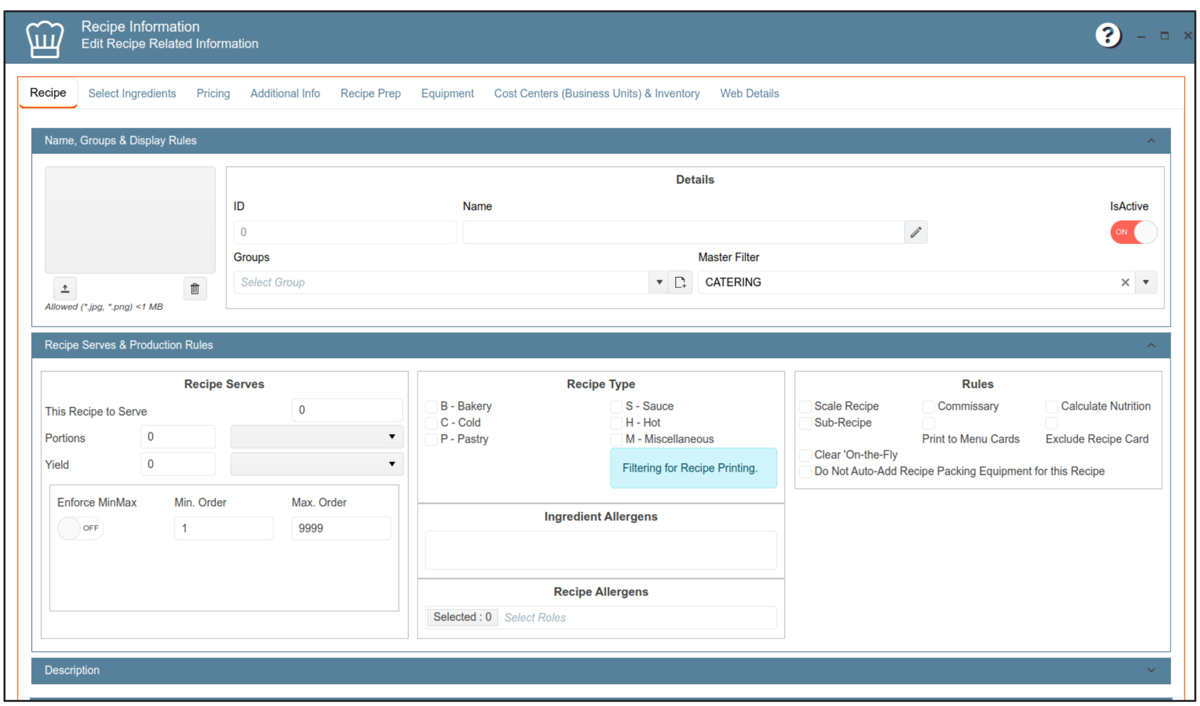
In the food management section, you can make changes to your recipes, ingredients, and menus.

Adding Recipes

In this section you can create recipes that can be used across events.

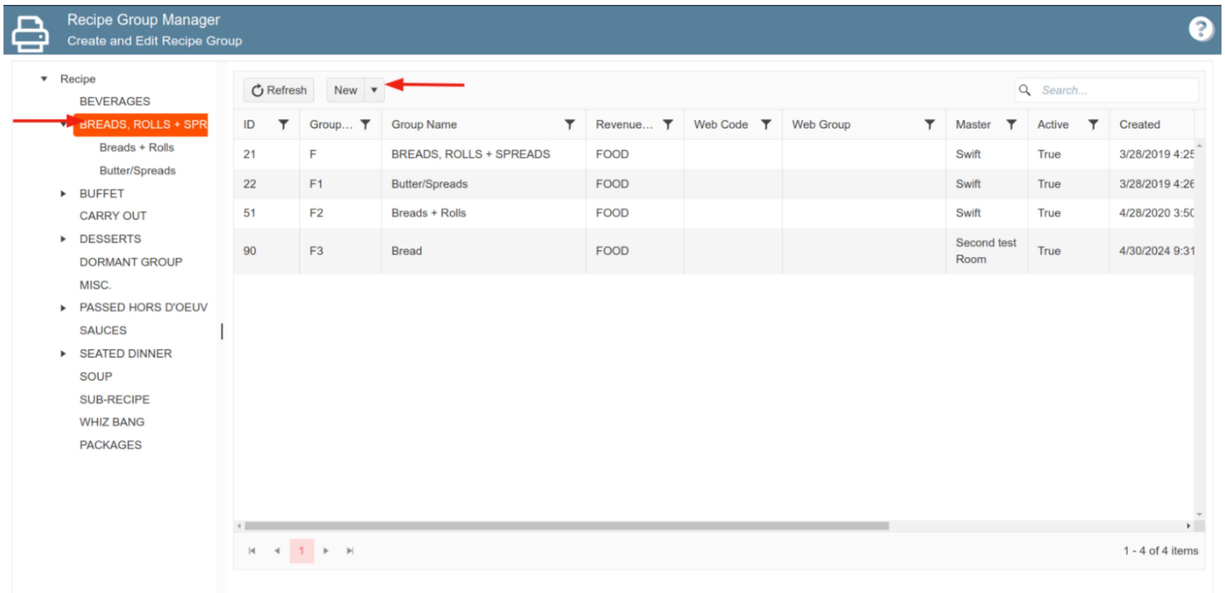
1. Click on the *Data Items* section located on the left pannel
2. Select *Food Management.* The *Food Department* window appears
3. Click on *Production Reports* and the *Production Reporting* window appears
4. From the menu, select *Recipe Management (All Items)*
5. Click on *New Entry*
4. The recipe information window will pop up, from there you can:
    a. Name the recipe*****
    b. Select a *Group* for the recipe*****
    c. Assign a *Master Filter******
    d. Set the *Portions******
    e. Set the *Yield**
6. Click on *Save*.

***** All these fields are required to save changes successfully.

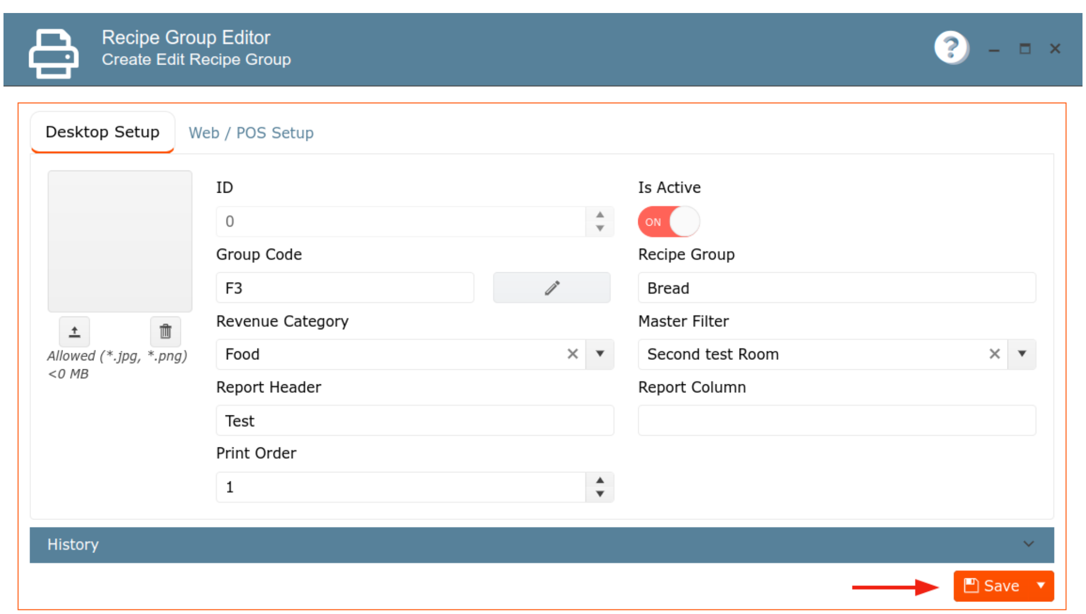


Creating Recipe Groups

1. Click on the *Data Items* section located on the left pannel
2. Select *Food Management* and the *Food Department* window appears
3. From the menu, select *Recipe Group Management*
4. Select the main recipe category
5. Click on *New*



6. The *Recipe Group Editor will* pop-up, from there you can enter/update all necessary information
7. Once you're done, click on *Save.*

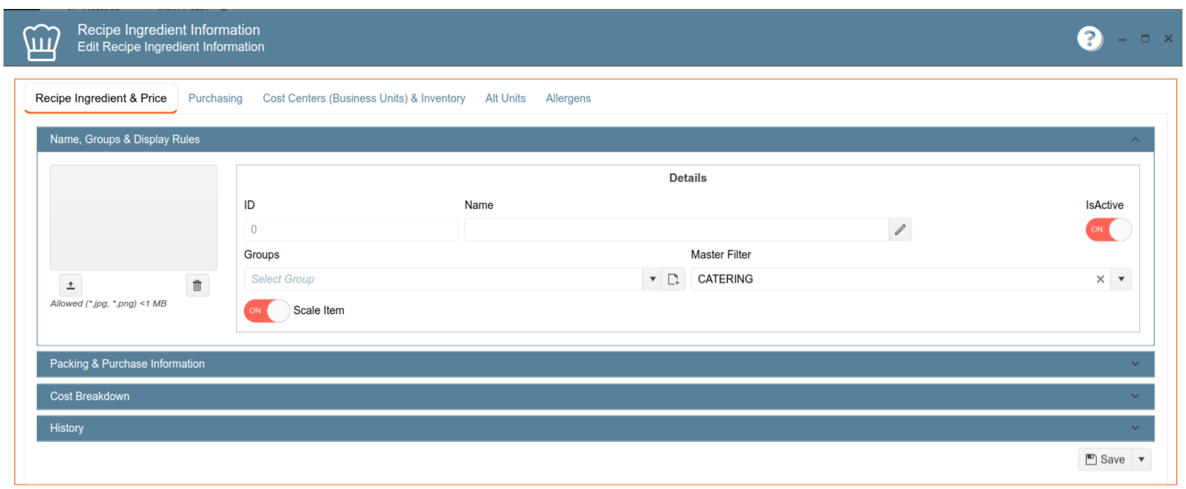


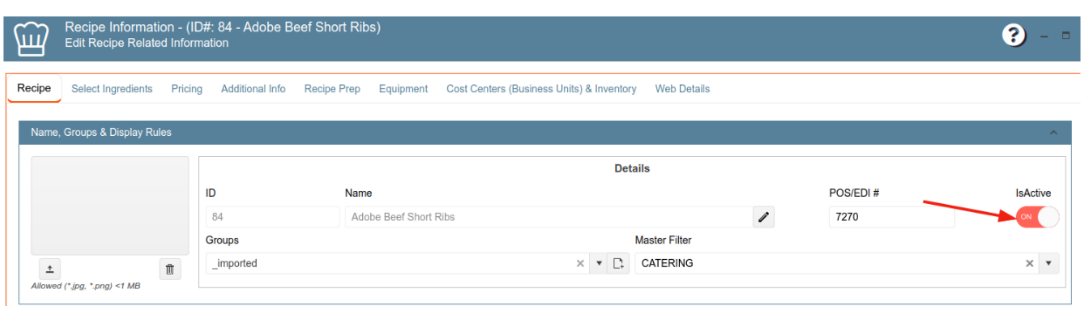
Deactivating Recipes

1. Click on *Data Items* in the side pane
2. Select *Food Management*
3. Click on *Recipe Management (All Items)*
4. Select the recipe you want to deactivate by clicking on the pencil icon or by double clicking on it
5. Turn off the *Is Active* switch
6. Click on Save.

Adding a New Ingredient

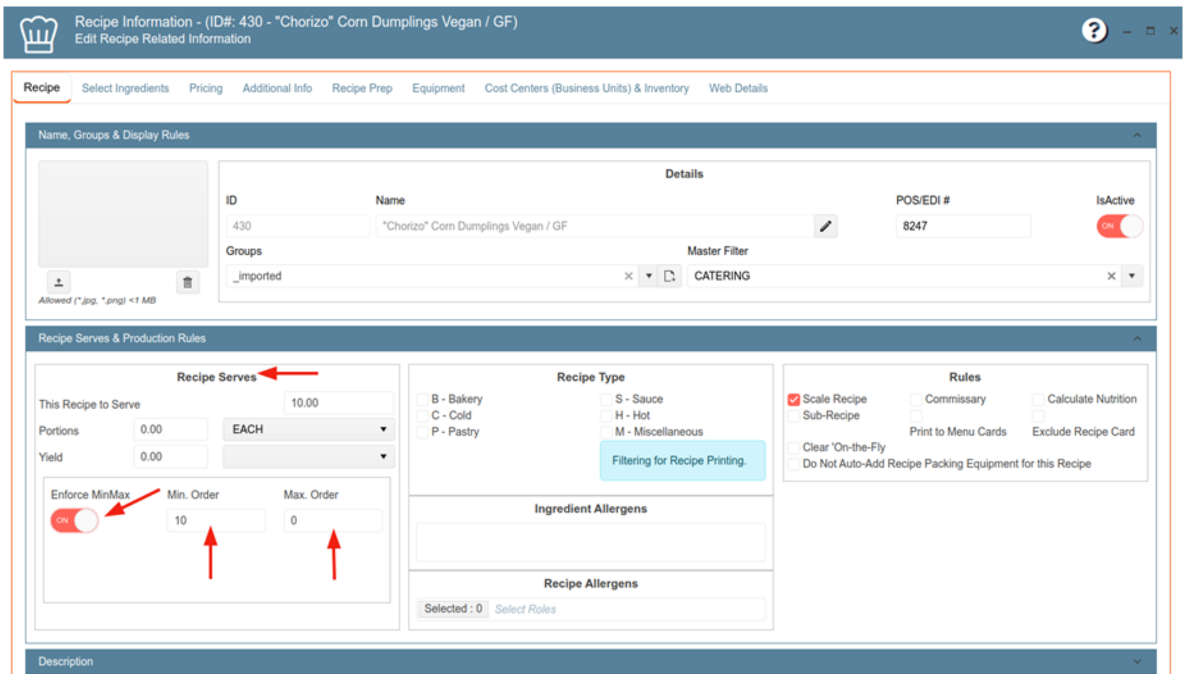
1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Ingredient Management (All Items)*
4. Click on the *New Entry* button
5. A pop-up window will appear
6. Name the ingredient*
7. Assign the group*
8. Once you enter all the required data click on *Save.*





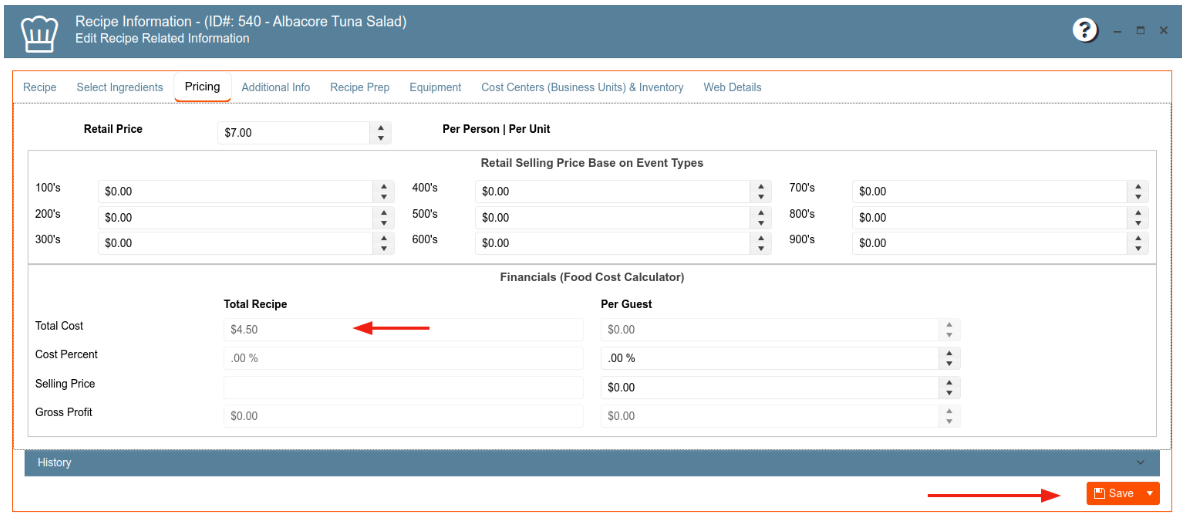
Setting Recipe Minimums and Maximums

1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Recipe Mangement (All Items)*
4. Select the recipe you want
5. In the Recipe Serves part turn on the switch name *Enforce Minmax*
6. Set the Min Order and Max Order
7. Once you Made all the changes click on *Save.*



Updating Costs and Prices

1. Click on *Data Items* on the side pane
2. Click on *Food Management*
3. Click on *Recipe Management (All Items)*
4. Click on the item you want to update
5. In the Pricing tab locate Total Cost
6. Change the cost
7. Click Save



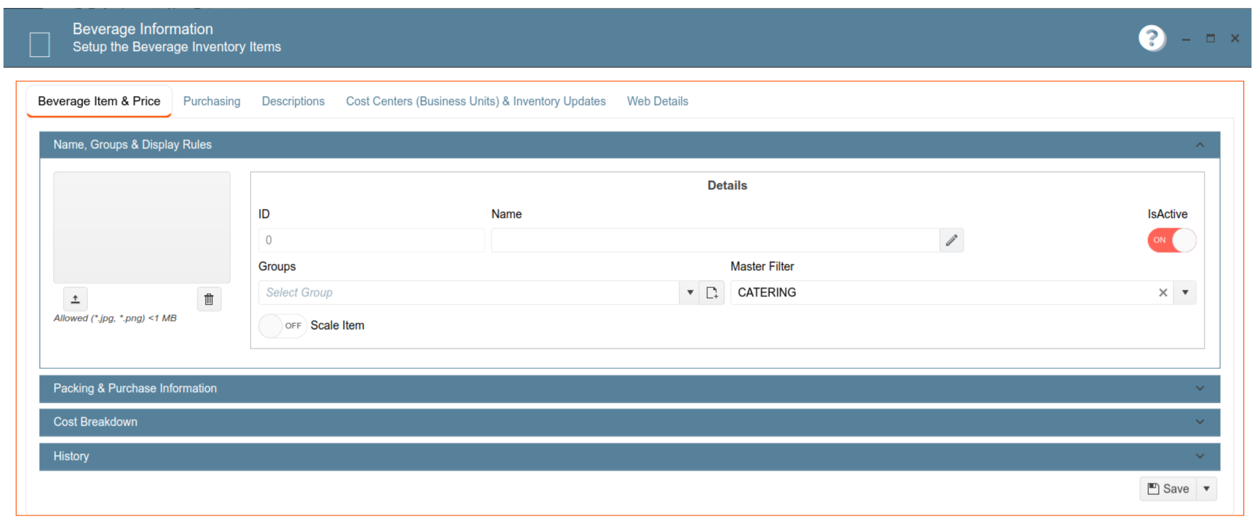
Important: The same procedure applies to drinks, equipment, and miscellaneous items.

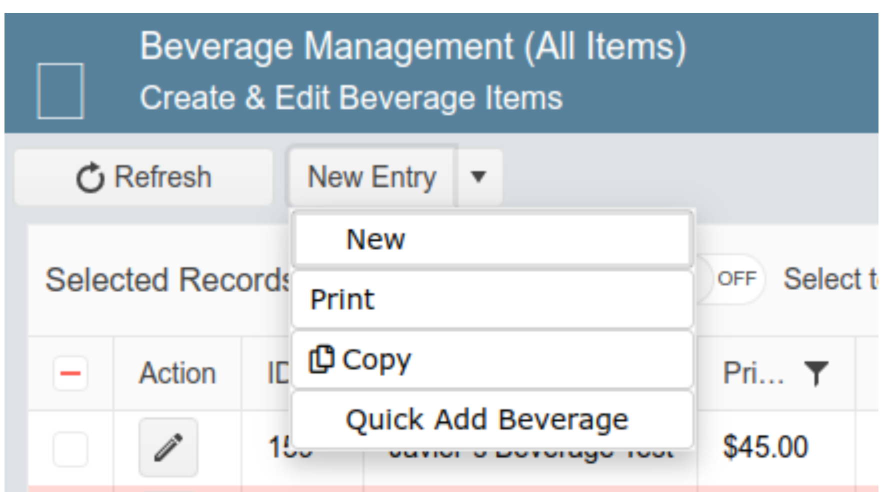
Adding New Beverage

1. Click on *Data Items* in the side panel
2. Select *Beverage Management* and then click on *Beverage Management (All Items)*
2. Click on *New Entry*
3. From the *Beverage Information* window, you can enter the required information
6. Click on *Save*.

* All these fields are required to save changes successfully.

Tip: By clicking the arrow in the New Entry button, you can either copy an existing record or generate a Quick Add Beverage.

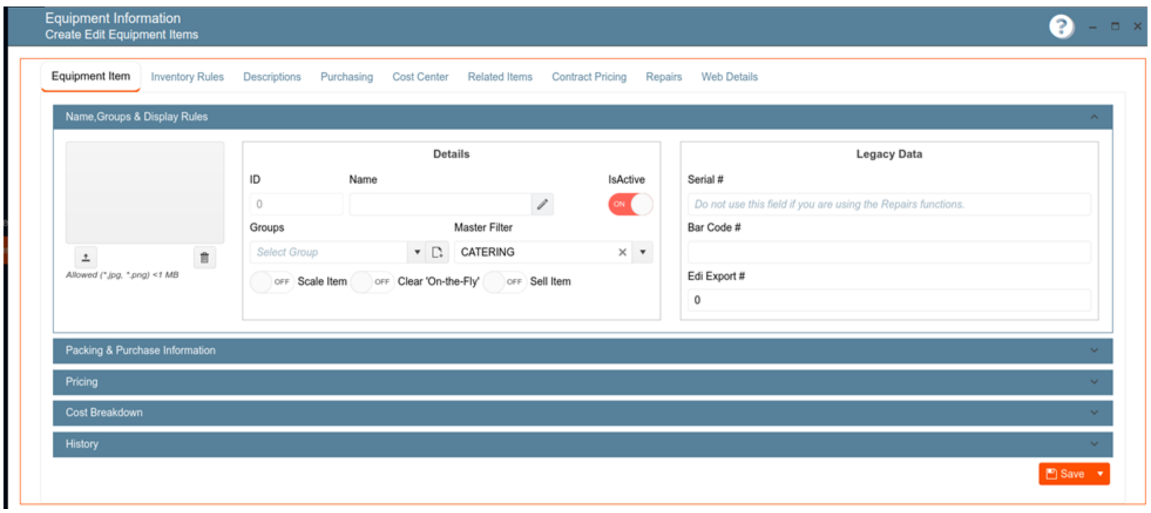




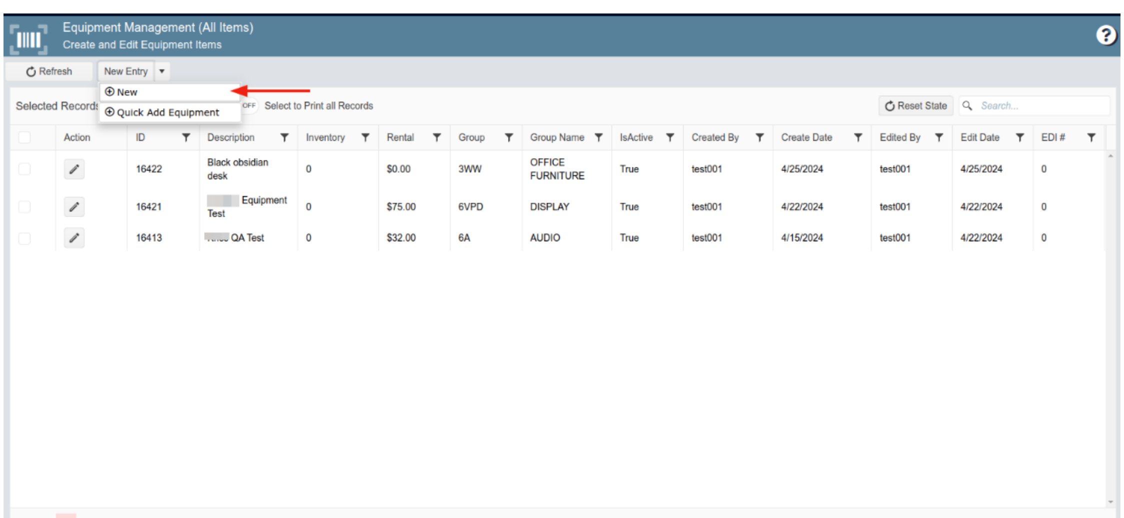
Equipment Management

Adding New Equipment

1. Click on *Data Items* in the side panel,
2. Select *Beverage Management* and then click on *Beverage Management (All Items)*
2. Click on *New Entry*
3. Fill in all the information about the equipment you want to add. Name of the equipment and Group are required fields to save changes successfully
4. Click on *Save*



Tip: By clicking the arrow in the New Entry button, you can either copy an existing record or get Quick Add Equipment.

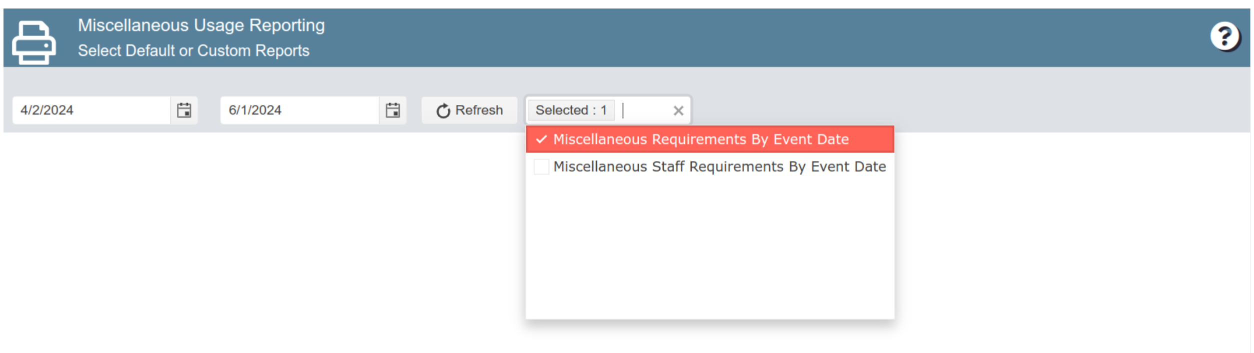


Miscellaneous Items

There are numerous types of items that can be added to your account, if the description of these items doesn't fit on the previous categories, you can add and edit them on miscellaneous items.

Miscellaneous Usage Reporting

1. Go to *Data Items* on the side panel
2. Click on *Miscellaneous Items*
3. Access to *Reports* and click on *Miscellaneous Usage Reporting*
4. Set a date range for the report that you want to get
5. Select *Miscellaneous Staff Requirements by Event Dates*
6. Click on *Refresh*
7. Click on *Print to* button and select the preferred item
8. The report will generate

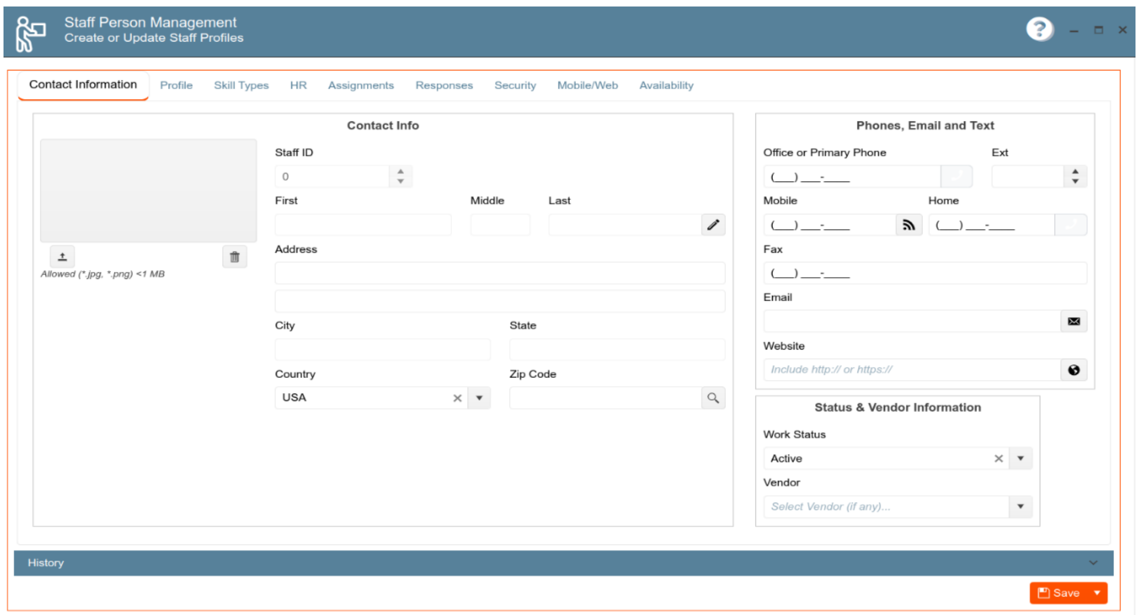


HR Management

In the HR Management section, you can manage your employees' information and skills in a single place.

Adding a New Staff Member

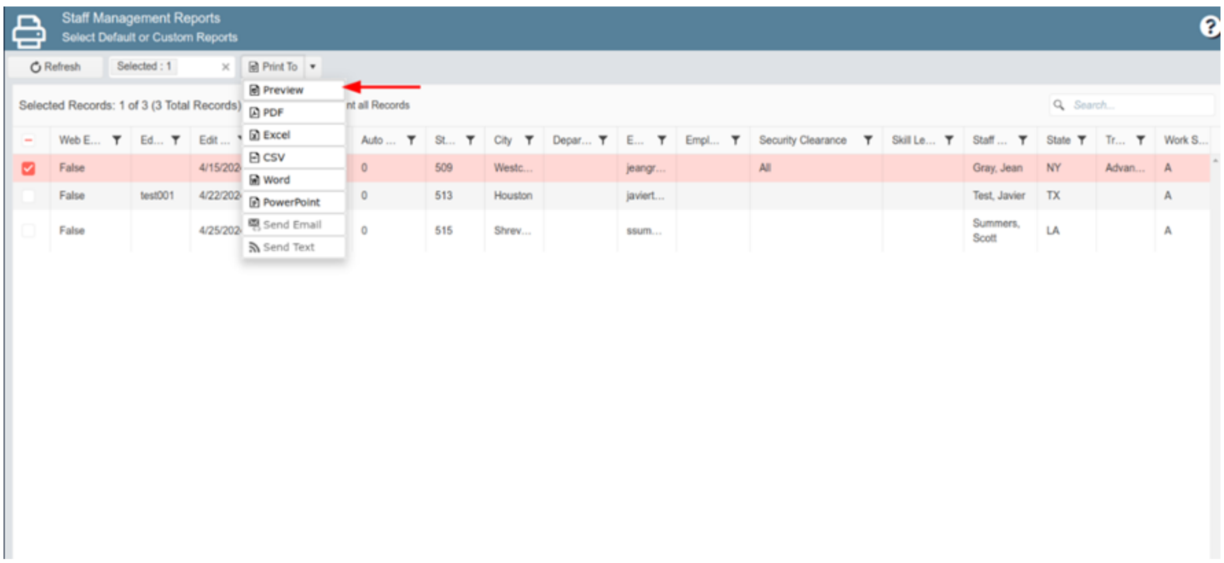
1. Click on *Data Items* in the side panel
3. Click on *HR Management*, then click on *HR Management (All Staff)*
4. Click on *New Entry* button
5. A pop-up window will appear
7. Fill in all the necessary information. Take into consideration that First Name, Last Name, Address, City, and State must be included to save changes successfully.
8. Click on *Save.*



Staff Management Reports

Using the *Staff Management Report* users can print a list of staff members and their associated skill types.

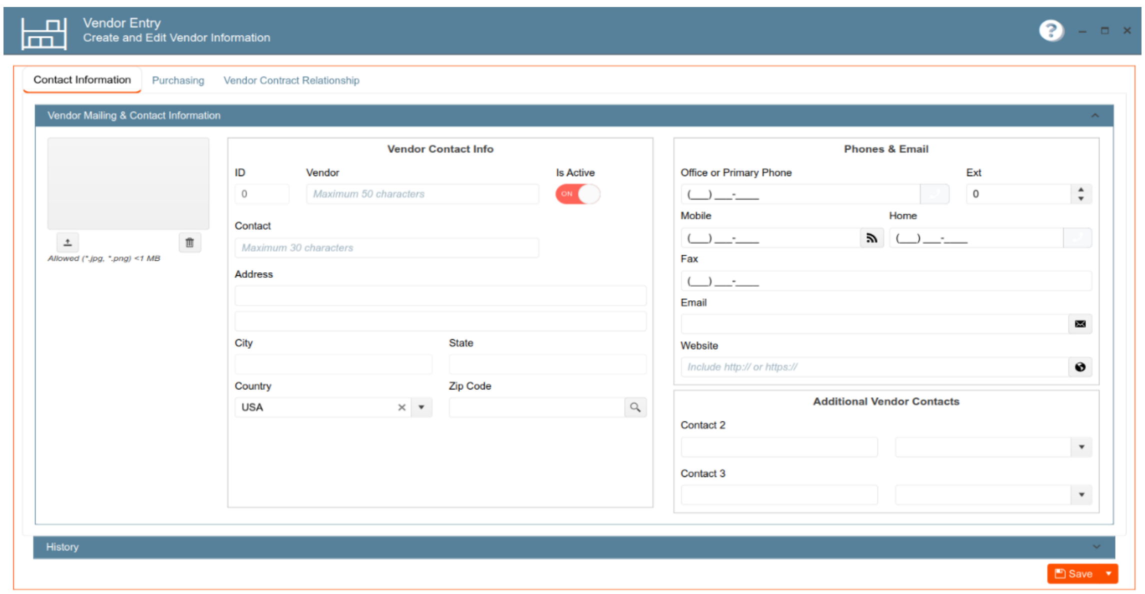
1. Click on *Data Items* in the side panel
2. Click on *HR Management*
3. Access to *Reports*
4. Click on *Staff Management Reports*
5. Select *Staff Detail Skill Type List*
6. Click on *Refresh*
7. Click on the down arrow next to the *Print to* button and select the preferred format
8. Elecate will generate the report.



Adding a New Vendor

Vendor management involves overseeing and optimizing relationships with suppliers, vendors, or external partners. In this section you can manage the contact information.

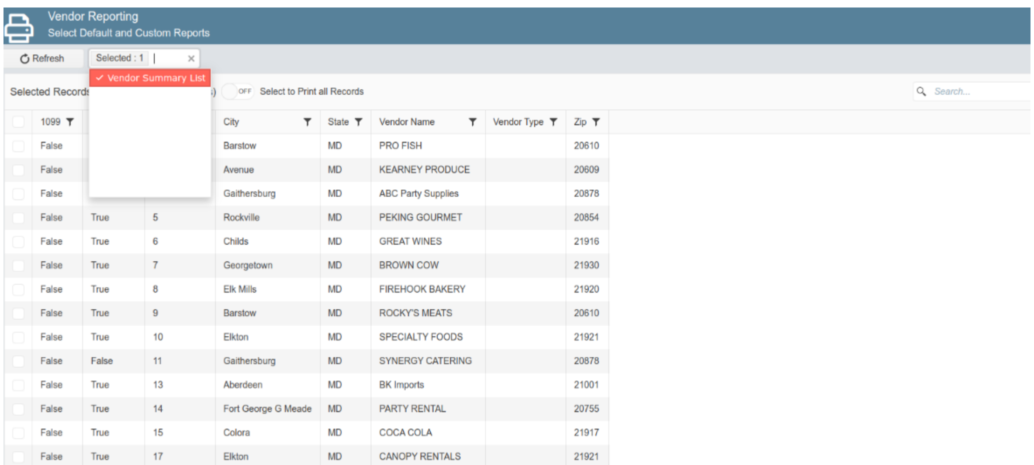
1. Go to *Data Items* in the side panel
2. Click on *Vendor Management*, then click on *Vendor Management- All Vendors*
3. Click on *New Entry* button
4. A pop-up window will appear
5. Fill in all the necessary information. Take into consideration that Vendor Name, Contact, Adress, City, State, County Zip Code, and Primary phone number must be included to save changes successfully
9. Click on *Save*.



Vendor Reporting

Just as in the other categories, you can get different reports for your vendors.

3. Go to *Data Items* in the side panel
4. Click on *Vendor Management,* then access to *Reports*
4. Click on *Vendor Reporting*
5. Select the vendor from which you want the report by clicking once on it
6. From the *Select Reports* box, Select *Vendor Summary List*
7. In the *Print to* button select the format you need
8. Elecate will generate the report.

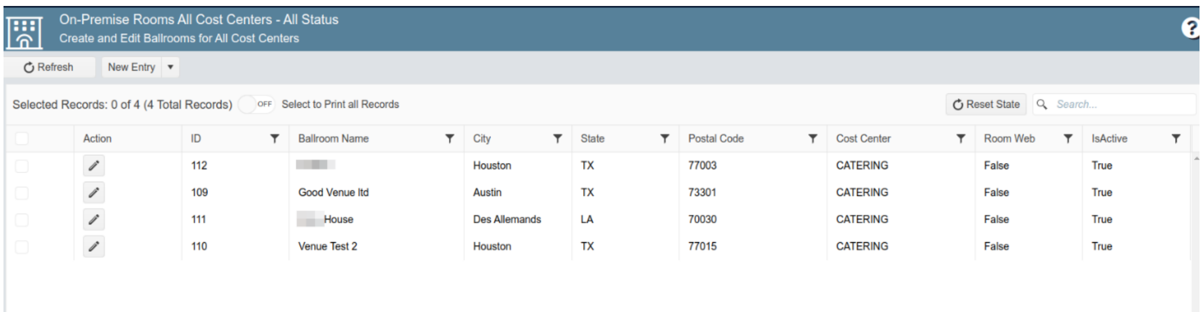


Venue Management

Adding a New Venue

You can oversee and store all the relevant venue information from contact info (address and phone) to rules and features. These instructions apply to both On and Off Premise Venues.

1. Access to Data Items on the side panel
2. Go to *Venue Management*, then select *On or Off-Premises Rooms All Cost Centers*
4. Click on *New Entry*, a pop-up window will appear
5. Fill in all the necessary information. Take into consideration that, Name, Address, City, State, County Zip Code, and Primary phone number, and email must be included to save changes successfully
9. Click on *Save*.



Venue Report

3. Click on Data Items on the side panel
4. Go to *Reports*, then select *On or Off-Premises Rooms All Cost Centers*
4. Access to *Venue Reporting* window
5. Select the report you need
6. Select the preferred format
7. Elecate will generate the report